



**Department of Education
Office of Student Financial Assistance**

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Front 2 Back
Facilitator Coaching II**

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Executive Summary

Student Aid Front 2 Back is the third in a series of core curriculum courses offered by SFA University. The purpose of the course is to help SFA employees and Operating Partners gain a better understanding of the process a student goes through when applying for financial aid, the other “players” in the financial aid industry (Schools, Lenders, Guarantors) and how they interact with one another in support of the student. Additionally, SFA employees and Operating Partners will learn more about the measurements that are being used by SFA to evaluate and improve SFA’s support of the student financial aid process.

A critical element of Student Aid Front 2 Back’s success is adequate preparation of its facilitators. This involves facilitator coaching. Following the formal Train the Trainer course, a facilitator coach observed a number of presenters in the classroom setting. Through this, the facilitator coach noted strengths and areas for development for each presenter, based on his/her classroom performance.

This document contains the core elements of facilitator coaching: the coaching process, key facilitation points, and facilitator coaching materials. In this installment, there are remarks covering the June and July timeframe for delivery of Student Aid Front 2 Back.

Facilitator Coaching Process

Using a standard format, the facilitator coach observed presenters, completed an evaluation of the training session, and spoke with each presenter regarding individual strengths and points for development. Through this, presenters developed an awareness of their existing skills and learned about areas in which they can foster new ones.

The facilitator coach is an expert presenter who is known by each of the presenters. This establishes a high level of comfort and respect through which presenters can develop their skills. While observing a Front 2 Back session, the facilitator coach serves as an observer and is not actively involved or engaged in the class. In this way, his presence is not a distraction, nor does his role alter the course of the session.

As the class progresses, the facilitator coach takes notes regarding the two presenters and, in some cases, the logistics coordinator. After the session, each presenter (and logistics coordinator, where applicable) has the opportunity to discuss these notes with the facilitator coach, elaborating on key points for consideration.



Key Facilitation Points

When observing a training session, the facilitator coach focused on specific areas, techniques, and approaches. These include, but are not limited to, the following presenter behaviors:

- Offers rewards, recognition, and encouragement
- Uses questions effectively
- Speaks clearly, enunciates
- Varies voice tone, volume, and pace
- Moves throughout the classroom
- Listens actively
- Assists participants with individual needs

In addition to these key points, the facilitator coach observes other general presentation skills that address SFA University's branding, such as interactivity and engagement of the audience, polish of facilitators, and support of co-presenters. Session notes reflect appropriate use of these techniques and suggestions for improvement.

Facilitator Coaching Materials

Appendix A includes the standard format for coaching facilitators. For each Front 2 Back session observed, the facilitator coach evaluated each presenter. Additionally, where appropriate, the coach noted suggestions for the logistics coordinator. These reviews are included in Appendices B – F. In these reviews, the facilitator coach observed a training session and noted strengths and areas for improvement for each facilitator. To preserve confidentiality, presenter names have been removed from the enclosed evaluation forms.

This document includes reviews for the following sessions:

- June 19, 2001: Washington, D.C.
- June 26, 2001: Denver
- July 10, 2001: Kansas City
- July 17, 2001: Philadelphia
- July 24, 2001: Washington, D.C.



Appendix A:

Facilitator Coaching Standard Format



Front 2 Back
Facilitator Feedback Format
Date - Location

Opening Summary:

- Congratulates presenters completing their *Front 2 Back* session.
- Presents overview of beginning of day, including welcomes and set-up.

Individual Feedback:

- For each presenter, this section contains chronological observations from the class session in notes format.
- This section also provides suggestions that presenters might try in the future to improve facilitation.

Presenter A

- Observations
- Might try this... and *Why*...

Presenter B

- Observations
- Might try this... and *Why*...

Logistics Coordinator

- Observations
- Might try this... and *Why*...

Closing Summary:

- Congratulates team on presenting the *Front 2 Back* session.
- Provides overview of key successes for the day.
- Reminds presenter to consider the points for development as they continue to refine their skills.



Appendix B:

**Facilitator Coaching
June 19, 2001
Washington, DC**



Front 2 Back
Facilitator Feedback
June 19, 2001 – Washington, DC

Opening Summary:

Congratulations on completing your first Front 2 Back class! On arrival this morning I noticed the signs in the first floor lobby that clearly showed your guests how to get to the class. As I entered the 6th floor classroom you were both attending to the participant's tables, engaged with your audience. These details are a critical component of a successful class and were evident as soon as I arrived - good job. The following are observations and content points from your class today.

Individual Feedback:

Presenter A

- Excellent energy!
- Good voice inflection, natural hand gestures, motions to slides
- Room is tight...but you moved around the room - do it more
- Moving along through the slides at a good pace
- *Cognoscente* is a good word
- Really good explanation of SAR award and needs based programs
- FSEOG good explanation of acronyms FFEL
- Quarried the audience at a perfect time - I get the sense that you really know your stuff
- Again, perfect questions for audience
- "Thanks, Presenter B"- facilitator frosting/polish
- Might try... to work off each other more - jump in when you can.
- Nice set up for "Yes And..." activity. Assigned tables nicely. Worked the groups really well. Great timing. You guys really carried the part. Best I've seen that activity go.
- Like your use of autobiography - I'm a part of the schools channel...
- Better movement around the room at the end of the day
- Explanation of COD, MOD, & Transformation was terrific.
- Great tie in on tennis ball activity - It's all about Mission, Process & Measurement
- End of the afternoon is loooong. Kept pace moving.



Presenter B

- Good attention to your fellow facilitator
- Nice transition from Presenter A
- Picked up right after Presenter A stopped -- no loss of energy
- Good voice tone, pacing, and volume
- Went right into game directions - explained very well (chunked directions)... One task at a time
- Excellent attention to the tables!
- Count down after break - "We're going to start in a minute"
- Good voice volume & pacing through the "kabobs"
- Good movement around the room
- Might try... to work off each other more...
- It's important to examine our perceptions... good point...
- Nice pause as you transition to the performance plan
- Choosing members of the class to answer measurement worksheet questions was an effective way to keep all engaged at the end of the day

Closing Summary:

Again, congratulations on completing a very successful Front 2 Back class. You both did a wonderful job facilitating. Today you were wonderful ambassadors for SFAU.



Appendix C:

**Facilitator Coaching
June 26, 2001
Denver**



Front 2 Back
Facilitator Feedback
June 26, 2001 - Denver

Opening Summary:

The following are observations and content points from your class today.

Individual Feedback:

Logistics Coordinator

Great attention to the audience, conscientious & professional - Thank you!

Presenter A

- Fielded question concerning explanation of *operating/trading partners*
- You kept moving through tiny stumbles - minimized your stumble
- Might try... more direction to tables during the activity/ wait much better at directing the tables! Yes and...
- Much better movement around the room & tables
- Might try...facing the audience while you walk around the tables
- Right on with the scrolling of the slides, good partner support
- Game set up went well - nice job both, good attention to tables as they played
- Glad you both wearing your lavalier microphones - keep doing that
- Reference to page numbers is solid
- Might try... during what I do exercise try giving your audience examples of what you are looking for
- Might try... during tennis ball activity/ all activities try 1,2,3, method
 1. This is called the Tennis ball activity- Here's the activity
 2. Your goal is to have everyone in this class touch the ball in the shortest amount of time. - Here's what we're looking for
 3. Ready set go....- go!
- Might try keeping your lavalier mic on! Especially late in the day
- Good job with the break - tuned in to your audiences needs



Presenter B

- Great attention to your fellow facilitator during opening
- Agreement section - additions worked well
- Plus up on the contractors-operating partners explanation
- Nice polish referring to “what Presenter A just mentioned”
- Natural hand gestures, great voice tone, excellent pacing
- Might try...pausing longer as you question the audience
- Good use of autobiography - “I know what it’s like to have three messages...”
- As a fan of good words they were all appropriate but be careful not to lose your audience - trilogy, inculcate, vernacular, capricious & arbitrary, genesis
- Funny use of sarcasm... “Thanks for making us feel welcome”
- Might try... pointing audience to the slide telling them what you are looking for
- PELL grant explanation was perfect... explanation, interesting, appropriate
- Again great hand motions
- Game set up went well- nice job all with the support
- Glad you both wearing your lavalier microphones
- Logical progression as you introduced the player cards... then introduced player cards
- Excellent relaxed tone after lunch
- You both seem to work together well
- Tallest structure exercise - put your mic on... you just did! Good job
- Excellent explanation of *enterprise wide* functions- defining financial partners
- GREAT job explaining the purpose of the enterprise services
- Again, excellent movement around the room

Closing Summary:

Again, congratulations on completing a very successful *Front 2 Back* class. You all did a wonderful job facilitating. Today you were wonderful ambassadors for SFAU.



Appendix D:

**Facilitator Coaching
July 10, 2001
Kansas City**



Front 2 Back
Facilitator Feedback
July 10, 2001- Kansas City

Opening Summary:

Congratulations to you both on completing another Front 2 Back class! The following are observations and content points, chronologically from your class today.

Individual Feedback:

Presenter A

- Nice opening... penny exercise step by step and explanation went well
- Nice tie in on *why* we did the exercise - mentioned the details
- Good tone, volume, gestures, expressions
- Might try “we” vs. “you”... all the time
- I like the number in the corner explanations for the pages
- I like the autobiography during agreements
- Let pause settle on the room- quiet audience will warm up
- Used audience’s names “Participant X mentioned”- excellent attention-getter
- Might try... more movement around the classroom
- Better “we” messages
- Really good handle on the guy that wanted skip over certain sections - “that’s a good point” - thank you for your comment. – Perfect!
- Timing of the into exercise was minimized very well... didn’t get to caught up with the time. You explained the point that was important.
- Good attention to tables as your partner facilitated - during the game also
- Tough audience during pop quiz - did the best you could
- Pauses are very ok as you transition through the slides
- Might try... walking into your audience as you facilitate, turn and look at the slides
- Good player card example asking...How does the student learn about aid options
- I like the count down of five min. after lunch
- Pacing on the kabobs worked
- Might try... “Now we’re on page 18” to keep audience focused on guide
- Again, personal true life stories add to kabobs... promissory notes story about the signature and authorizing funds
- Invited Presenter B to comment.... perfect - And he jumped right in
- Glad you guys were wearing your mics. - Gives you a leg up
- Joking with audience member, great way to keep folks engaged and interested
- Again, good kabob pace and info - strong



- Great loan story on repayment options!
- Team name add on to Presenter B's directions in the Yes and activity - *great*
- Plussed up Presenter B's tinker toy activity! Great puzzle piece connection
- Good job with the explanation of the Modernization and Transformation
- The point that I'm making... excellent on the last piece with the selection
- Might try... more direction on the final exercises- in groups

Presenter B

- Opening - jumped in with the agreements - good
- Added in "learning together"- meaty
- Encouraged audience
- Handled the difficult guy really well...jumped in on the detail & level of the content
- Good attention to the tables as they worked
- Perfect allotment of time for the "draw the process" exercise
- I like your brief autobiography of the FAFSA application - you filled it out
- Good movement around the room
- Nice intro to Presenter A
- You handled Participant X well... doesn't want pens, that's ok
- You might try directing the student's life participants to the different tables.... "We need four at a table"
- Good explanation of the game... better direction, step by step, really well done
- Again, really good attention to the tables as they played the game
- Good pacing through the apply, receive & repay - students journey - slides points and page
- Great when you jump in as Presenter A presents, makes you more of a team
- Let's start the player card activity - great!
- "Do we want to go ahead and do the first one so that everyone gets of on the right foot" – great job helping audience understand what to do!
- Nice addition to apply, receive, repay - comment on the complexity
- Thank you for participating especially in the afternoon slump.
- Yes And Activity... explanation was great - like the "ready go" set up, nicely done with a tough audience
- Who works with eligibility? Hands went up-good technique
- Again, great job with Dianne, you didn't let her throw you off track
- Nice help prompting the audience, and jump in with modernization
- Really like your Kay Jacks quote - from the article
- Speed, Quality, Cost - nice tie in to PBO

Closing Summary:

Again, congratulations on completing a very successful Front 2 Back class. You both did a wonderful job facilitating. Today you were superb ambassadors for SFAU.



Appendix E:

**Facilitator Coaching
July 17, 2001
Philadelphia**



Front 2 Back
Facilitator Feedback
July 17, 2001- Philadelphia

Opening Summary:

Congratulations to you both on completing another Front 2 Back class! The following are observations and content points, chronologically from your class today....

Individual Feedback:

Presenter A

- Good opening
- “Please join in” set your expectation of the audience
- Nice movement around the room
- Good natural hand gestures, tone body movement, love the accent
- *Great* pause as you asked the audience questions!
- Might try... consolidating the tables
- “We going to take a new look at what we’ve taken for granted”- great tie in on the penny exercise.
- Might try using your mic.
- Excellent explanation of the OP’s vs. Contractor segment
- Reference to the book keeps your audience engaged - appendix...
- *Great* tie in on agreements... vs. & service standards. “On time... What’s that an example of...”
- Ask it basket is good use of autobiography, “I think like helter skelter...”
- Grandmother cell phone agreement really makes sense
- Really nice opening!
- I like that you participated in the into line up... good energy... clapping
- I like the way you “plus up” when your audience gives you an answer
- Seems like you really brought out your audience- good responses to your questions on the student aid process
- Again, excellent movement around the room
- Great question about how important it is to all have a common understanding of the process” – waaaaa whoooooooo! That’s why we’re here today
- Game set up...clear concise
- Game debrief - excellent questions to the audience on perspective, learning, understanding key points - great tie in
- Might try... “chiming in” on each others parts
- Right on with the slides prompting during kabobs



- Excellent recap of the a.m. activities and content! Great
- Yes and... example of the fruit was perfect! - count down to finish good “30 seconds apply”
- Might try... unless it’s really important I wouldn’t revisit old stuff - (winner of the yes and activity) gets us off track and loses focus
- Might try referring to the page to help group understand the what I do activity
- Really liked your tennis ball activity second run set up. - Mission, Process, Measurement! Really great post tennis ball activity
- Like the way you called out that guy. “You look like you want to say something...” brought it around very nicely

Presenter B

- “Well good morning everybody...” - strong opening
- Providing context was a great start
- Soft natural tone, voice inflection, hand gestures - really great
- Us & We vs. You – perfect
- “Not that we were doing anything wrong in the past” – nice point
- Excellent use of the slides as your notes
- Good point on depth of DC vs. region info in class - programs
- Might try... Scrolling slide gives info you’re looking for - sample fun facts would help your participants
- Good point on the timing of the class - if we finish early...
- Excellent use of the autobiography
- Glad to hear you annunciate the acronyms (such as FAFSA)
- Good pacing through the stuff that they know
- Reference to the student guide - info was good
- Might try... “chiming in” on each others parts
- Pop quiz – following instructions, good encouragement
- Another good reference to the page numbers
- Explanation of Guaranty agencies was great (NJ first)
- Emphasis on the fact that the student only sees SFA vs. OP’s.
- Explanation of the lunch activity really understood
- Kabob pace was perfect for this audience - appropriate in pacing, depth
- Steered the tinker toy activity well... “So what is the point of all this” - great
- Want you to use the lavalier microphone
- Might try...handled Participant Y and Ombudsman’s office questions well- wait to answer questions until after break (Ask It Basket stuff)
- Again, good reference to the page numbers and info
- Modernization explanation worked well - good job
- Nice job, no **excellent** job handling the negative folks... I understand what you’re saying... Might try just move along.



Closing Summary:

Again, congratulations on completing a very successful Front 2 Back class. You both did a wonderful job facilitating. Today you were superb ambassadors for SFAU.



Appendix F:

**Facilitator Coaching
July 24, 2001
Washington, DC**



Front 2 Back
Facilitator Feedback
July 24, 2001 – Washington, DC

Opening Summary:

The following are observations and content points from your class today.

Individual Feedback:

Presenter A

- Might try... a count down before you start...
- Nice opening - facilitated well - good tie in to the standards
- Appropriate scrolling through the slides (ones you covered)
- Might try... "we" vs. "I" orientation as you present
- Good pacing, voice inflection - you have a *friendly* voice
- Good direction to class on the lineup of the group
- Might try... "Ready, Set, Go" to begin exercises. Will let your class know when to start. More crisp execution
- Wrap on the introductions was well done
- Nice job keeping on track - home schooling example you said "thank you for that... what else"
- "Save that one" – encouraged continued responses from your audience
- Came right back to
- Might try... picking up the pace on eligible students piece
- Good use of autobiography on NCS Pearson... "I sit next to..."
- Might try... a brief explanation of the depth of student aid content of the program
- Effective use of autobiography... (niece playing basketball...)
- "Thank you" to your audience for info- perfect
- Nice plus up on game "mind set"
- POP Quiz was facilitated really, really well
- Might try relating the tennis ball activity to the actual mission of SFA... and getting better at accomplishing our mission once we measure the
- Good information about NCS & how they take the calls seriously
- Might try... More direction on measurement worksheet (2) work together
- Need more direction on that



Presenter B

- Nice attention to your fellow facilitator
- Like that you participated in the introductions line up, nice touch
- Strong voice -- clear
- Nice attention to the tables as the class drew the student process.
- *Great* preface & set up to the Student Life game - excellent references to past programs
- I want you to have a lot of fun - sets expectations of the activity really well
- Nice when you rise to speak to audience as questions come
- Excellent set up on the "Yes And" activity... good direction & directions
- Nice recap of where we are and where we're going
- "That wouldn't be good products and services" nice tie in to the SFA standards.
- "We" orientation during enterprise wide functions provides buy in for audience-nicely done
- Might try... giving more direction on the "What Do I Do" activity... how do I share what I do with the table?
- Nice pause as you began
- Hand motions are natural
- Good reference to the participant guide on Modernization & Transformation
- Again, nice use of autobiography... taking a time out to help the students
- I like your Edison analogy

Closing Summary:

Again, congratulations on completing a very successful *Front 2 Back* class. You both did a wonderful job facilitating. Today you were wonderful ambassadors for SFAU.